

1. Need and Rationale

Since 2003, the Oklahoma Department of Libraries (ODL), the Oklahoma Historical Records Advisory Board (OHRAB), and the Oklahoma Museums Association (OMA) have worked together to provide training, funding, and networking opportunities for Oklahoma's 650 museums, archives, and libraries. On an informal basis, the organizations support and promote activities sponsored by the individual organizations, and on a formal basis, the organizations partnered on a 24-month project funded by the National Historical Records and Publications Commission to provide training, funding, and professional consultations to 25 organizations. All three organizations are providing support to the IMLS-funded 2007 National Conference of Tribal Archives, Libraries, and Museums (Oklahoma City, October 2007). Organizational profiles may be found in Attachment 1.

The individual partners assess the needs of their respective constituencies through formal surveys. In 2004, the OHRAB conducted a statewide survey of historical records repositories. The purpose of the survey was to determine the types of records held in collections, the condition of the records, and the needs of repositories. In all, 236 responses were received from museums, public libraries, historical and genealogical societies, tribal entities, academic libraries, archives, and special libraries. The survey found that during the year preceding the survey, 100% of repositories reported losing records, either through theft, water damage, mold, pests, fire, or filing errors. The survey found that 50% of repositories do not have collection policies, 86% do not have disaster preparedness plans, and 74% do not have strategic plans. When asked to identify and rank priorities, repositories indicated their greatest priorities were to 1) improve preservation/conservation; 2) improve professional skills; 3) increase public access through better finding aids and processing backlogged materials; 4) improve facility/storage conditions/ 5) increase public awareness; 6) develop plans, policies, and procedures; 7) increase financial support; 8) expand volunteer base; 9) increase use of technology; 10) expand the size and scope of collections. The Survey Summary may be found in Attachment 2.

In 2007, the Oklahoma Museums Association engaged the services of the Bureau for Social Research at Oklahoma State University to gather input regarding the needs of Oklahoma museums and how the Museums Association might improve or modify their programming and services to address those needs. The Report may be found in Attachment 3. Four focus groups prioritized the following challenges: 1) budgets and funding; all areas of marketing, from getting information out to the public to attracting visitors and reaching niche audiences; 2) human resources and the need for qualified staff members; 3) working to educate board members and donors on the workings of the museum and their roles; 4) creating programs and exhibits that both educate and entertain; 5) competition for public interest and funding; 6) decrease in donors; and 7) changing a culture that does not appreciate or value museums.

The focus groups indicated a need for training in board education, time management, facility management, group dynamics, grant writing, human resource management, legal issues, and basic museum management.

Preferred methods of delivering training were online access to sessions through video streaming, live chat, or pod casts, videos or OMA/OHRAB/ODL workshops to access at a later date, regional workshops, and broadcast trainings of workshops to satellite locations. Barriers to attending training were location, budget limitations, staffing limitations, and lack of buy-in from the board for training.

Services of most importance were: 1) fundraising ideas and practices that work; 2) assistance with educational programming; 3) educating boards on their responsibilities regarding fundraising; 4) promotion; 5) clearinghouse of resources; disseminating information; 6) assistance with obtaining adequate facilities; 7) media and marketing help; 8) establishing legislative programs, advocacy; developing legislative clout; 9) regional workshops; 10) online or DVD access to workshops; 11) networking opportunities; and 12) connecting museums with students and volunteers

2. The Planning Process

With funding from the *IMLS Connecting to Collections Statewide Planning Grant Program*, the partners now have an opportunity to address the most crucial and universal need identified by the state's cultural heritage institutions: the need for a permanent source of funding.

The partners propose a 12-month statewide process that will produce a plan of action to develop the Oklahoma Cultural Heritage Trust. Similar trusts (Oregon, Texas, New Jersey, and others) have successfully strengthened the connections between cultural resources, community and economic development, and the citizenry.

The proposed Oklahoma plan deviates from the referenced organizations in that it focuses solely on collections held by the state's libraries, archives, and museums, excluding performing arts.

Following the model established by The Oregon Cultural Trust (www.oregontrust.org), the partners will establish a statewide task force to develop priorities and establish policy recommendations to create the Oklahoma Cultural Heritage Trust (OCHT). Its goals are to:

- 1) Establish a cohesive unit for the purposes of providing resources to protect and stabilize Oklahoma's museum, library and archives collections;
- 2) Facilitate partnerships to address cultural development initiatives in a coordinated fashion not possible through independent efforts;
- 3) Form a statewide coalition of individuals and organizations with an interest in culture who will be advocates for collection care, help create a united voice, and establish the critical mass that is necessary to achieve and promote large-scale, long-term change.
- 4) Increase public awareness of the condition and needs of Oklahoma's valuable collections and bring higher visibility to the work of the state's cultural institutions; and
- 5) Increase the capacity to leverage public and private funds as a means of addressing the long-term protection, preservation, and care of artifacts, documents, records, and other cultural assets held in the collections of

Oklahoma institutions through the development of an action plan that has the buy-in of the public in general and key stakeholders in specific.

While cultural plans similar to the Oregon Cultural Trust exist in many communities, and have been successful in strengthening funding for performing and visual arts, none focus solely on providing support for collections care. A goal of this project is to use the methodologies that have proven successful in the development of cultural plans, but specifically targeting collections care. A possible outcome is a model that can be replicated in other states.

Commencing in March 2008, the partners will:

1. Engage a consultant to help guide the process. The partners have been in discussion with Louise K. Stevens, the president and founder of ArtsMarket, Inc., the consultant who was responsible for helping develop the Oregon Cultural Trust. Ms. Stevens will guide the partners throughout the planning process, assist in the development of surveys and interview questions, facilitate meetings, help analyze information, assess funding feasibility, and help write the strategic plan. (\$20,000, IMLS)
2. Develop the Oklahoma Cultural Heritage Trust website. The dedicated website will enable the public to learn about the goals and objectives of the project, provide input, volunteer, track progress, learn about regional meetings, etc. The website will eventually evolve into a more comprehensive site that provides support for cultural organizations similar to the Oregon Cultural Trust website. This site provides tools and reference materials to assist organizations obtain local support, marketing tools and tips, and information for tax attorneys and accounting professionals on ways clients can benefit from giving to the Trust. The partners envision the website will eventually be a clearinghouse for information on the care of collections, including information for individuals who wish to gift collections or items to cultural institutions. (\$1,000, IMLS/*\$5,000, partners)
3. Develop collateral support materials. To support efforts to communicate the concept of the Trust, brochures, packets, letterhead, envelopes, etc. will be developed and printed. (\$1,500 IMLS/*\$4,000 partners)
4. Identify key stakeholders and form Steering Committee. Presently identified are representatives from the three partnering organizations, local universities with major collections, the Oklahoma Educational Television Authority, the Oklahoma Historical Society, the Oklahoma Humanities Council, the Department of Commerce, the Department of Tourism and Recreation, Oklahoma Main Street, National Trust for Historic Preservation, Southwest Office, and representatives from a few major corporations and foundations. The Steering Committee will have no more than 15 members, with each member assigned specific responsibilities. (\$3,200, partners)
5. Identify and recruit cultural and community leaders for Statewide Planning Task Force. The Statewide Planning Task Force will be made up of at least two representatives from each of the state's 77 counties. In addition to key staff

and board members who are active with libraries, museums, and archives, members of the Oklahoma State Legislature will have the opportunity to appoint up to two members from their respective constituencies. In addition to helping establish local needs and support, the appointees will help with local arrangements for regional meetings and, hopefully, become future advocates for the project as it seeks permanent funding for collection care. (\$1,200, IMLS/\$3,500, partners)

6. Conduct a statewide media campaign. The purpose of the campaign will be to call attention to the condition of Oklahoma's collections, the need for preservation, and the need for support. The concept of the Cultural Heritage Trust will be introduced and input from the general public sought. Input will be provided through surveys on the Cultural Heritage website, which will also provide a mechanism if the public wishes to contribute financially. (\$800, IMLS/*\$2,500, partners)
7. Host a Cultural Heritage Summit at the Oklahoma City Zoo Education Center. The purpose of the summit is to gather key stakeholders together to discuss the concept, methods, benefits, and feasibility of creating a Trust. As a way of providing relevant information that will be of use to the group as a whole, part of the day will be dedicated to the concept of developing community-based cultural plans. Step-by-step toolkits will be provided to the participants so they may return to their communities with the ability to advocate and stimulate local activity. Eventually, the partners plan to seek funding to provide assistance with the development of local or regional cultural plans. (\$3,500 IMLS/\$6,000, partners)
8. Hold regional meetings around the state. Following the statewide Summit, a series of smaller meetings will be held in communities across the state, ensuring a broad range of participation. A minimum of six regional meetings will be held. (\$5,400, IMLS/\$3,600 partners)
9. Assess Funding Feasibility. To determine if there is long-term, broad based, support for a Cultural Trust, interviews will be conducted with foundation and corporate staff, as well as individual philanthropists. Because of its oil industry, Oklahoma is home to considerable wealth, with more than 200 foundations and 825 corporations that are potential supporters. In addition to private support, public support will be tested through interviews with key decision makers, i.e., members of the state legislature. (\$1,000, IMLS/\$2,000 partners)
10. Hold two-day planning retreat. At the conclusion of the regional meetings, individual interviews, and other collection of data, a two-day planning retreat will be held to reach consensus on key methods to support Oklahoma's heritage resources. (\$5,000, IMLS/\$9,887.50) partners)
11. Prepare and disseminate the Oklahoma Cultural Heritage Trust Strategic Plan. Following the planning retreat, a detailed plan will be developed and disseminated to key stakeholders for input. Once finalized, a representative

advisory board will be appointed to commence execution of the plan. (\$600, IMLS/*\$2,200 partners)

3. Project Resources and Personnel

Project Staff: Key project staff includes Jan Davis, deputy coordinator of the Oklahoma Historical Records Advisory Board, Susan Feller, development officer of the Oklahoma Department of Libraries, and Brenda Granger, executive director of the Oklahoma Museums Association. These staff members have worked successfully together on a number of projects, including most recently executing a series of statewide workshops on planning and implementing successful public programming in museums and libraries and producing the 2007 National Conference of Tribal Archives, Libraries, and Museums (Oklahoma City, Oct. 22-25, 2007). The three staff members have a close professional relationship that is built on trust, respect, and a shared commitment to providing resources for Oklahoma's libraries, archives, and museums.

Each staff member is responsible for ensuring the participation of their respective constituent groups. Ms. Feller will serve as the project manager, with the understanding that each key staff member has input into the decision making process as well as a responsibility for ensuring the success of the project. Ms. Feller has experience in cultural planning and will guide the process, along with the consultant.

Stacy O'Daneil, the administrative officer for the Oklahoma Museums Association will provide administrative support and coordinate all meetings.

Bill Young, the Public Information Officer for the Oklahoma Department of Libraries will coordinate all publicity efforts and will supervise Bill Struby, ODL's graphic artist in the development of materials. Mr. Young will also provide assistance with the development of the website.

Budget: The maximum amount of \$40,000 is requested to fund consulting fees, travel, supplies and materials, and meeting expenses. Partners will provide an in-kind match of \$38,156.25 (*Total partner contribution does not include \$7,200 is non-qualifying staff salaries of the ODL Public Information Office staff which are federally funded.)

Sustainability: Not only will this plan help develop the methodology for funding developing a permanent source of funding for collection care within the state of Oklahoma, it has the potential to serve as a model for other states.